

RECORDS SERVICES DIVISION

RECORDS MANAGEMENT PROJECT ASSIGNMENT MEMORANDUM

24 November 1953

SUBJECT: Records Management Survey and Establishment of Records Management Program in the Medical Office.

I. Origin and Purpose:

The Medical Office is anxious to institute an active records management program. As a result of arrangements made by [] of the Medical Office, and the Chief, Records Services Division, records analysts from the Records Services Division will make a records management survey and establish an active records management program.

II. Method of Conducting Survey:

This project will be undertaken by the General Services Office which will also be responsible for maintaining the continuing program. [] will serve as our liaison with the Medical Office. [] records analyst, will conduct the overall survey which will be started on 27 November 1953.

25X1
25X1

The survey will consist of the following:

1. Disposition:

- a. Take records inventory and make appraisals in terms of the administrative, fiscal, legal, historical or other values of each series or group of records listed.
- b. Prepare records control schedule - obtain necessary clearances and concurrences on disposition standards from operating officials.
- c. Obtain and/or adapt disposal authorizations.
- d. Activate records control schedule.
- e. Take files equipment inventory; study and plan for most efficient utilization of equipment - make recommendations.
- f. Follow-up to assure understanding of the schedule and that action is being taken.

CONFIDENTIAL
Security Information

2. Systems:

- a. Study receipt and distribution of incoming communications - dispatch of communications; determine if improvement is necessary - plan and help to install improved system.
- b. Study reference requirements of operating officials - plan the establishment of official file station(s) in accordance with these requirements.
- c. Determine the files that are appropriate for subject matter classifications - study these files for the purpose of establishing a tentative Subject List - refine this Subject List (as well as possible) - get official approval.
- d. Study all specialized files to determine the appropriateness of maintenance in terms of reference needs and application of cut-off procedures.
- e. Train file personnel.
- f. In terms of plans made for communications, file stations and Subject filing, install most acceptable, approved systems.
- g. Follow-up to determine the need for and to make necessary modifications and to assure that training is adequate.

3. Forms Management Survey

4.. Reports and Correspondence Management Survey

If assistance is necessary in carrying out the survey in certain specialized areas, it will be provided as follows:

- a. Records systems
- b. Forms management
- c. Reports and correspondence management



25X1


III. Other Factors:

Analysts will maintain a record of the time expended on the project and at the end of each reporting week will make a progress report through their respective Branch Chiefs. In addition, [] will maintain a cumulative total of the time expended on each program phase for all analysts participating.


Security Information

The Chief, Records Services Division, will consult with the Chief, General Services Office, and with the Medical Office, periodically and report on the progress of the project.

25X1


Chief, Records Services Division

Approved:

1 
Chief, General Services Office

To All Branch Chiefs:

1. Upon my request, the General Services Office has agreed to assist us in establishing a records management program in our Division. For this purpose, it will be necessary to inventory and review our records holdings to initially develop and activate a records scheduling program and for the purpose of developing a filing system in conformance to Agency standards. Subsequent activity will involve the development of standards for the management of all forms, reports and correspondence created, used and maintained in the Division.

2. [] has been assigned to spearhead this activity and will begin to work with us on 16 November 1953. It is anticipated that other records analysts of the General Services Office will be working with [] as needed, primarily for the purpose of enhancing the progress of the program. [] will represent this office and will work with the records analysts of the General Services Office.

25X1

3. It is expected that this program will be carried out with minimum interruption to current operations. Your complete cooperation will be appreciated.